

# Regular Research Grant Account Start Up Guide



**MARQUETTE**  
UNIVERSITY

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Office of Research and Innovation

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## Introduction

Congratulations on receiving an RRG award! The Office of Research and Innovation is committed to helping each faculty member use their funds effectively to complete their goals within the project timeline. Each faculty member will be responsible for their own spending and transactions within their department, but there may be times when the Research and Innovation team can help you plan or figure out how to do something within the university policies and procedures.

This document will act as a starting point, outlining how you get your account number, what it means, how to access it, and how use it. Due to the wide variety of projects no summary can contain everything you may need to know. If you don't know which department to work with, please contact the Office of Research and Innovation at [Innovation@marquette.edu](mailto:Innovation@marquette.edu).

## Understanding Your RRG Account Number

After your project has an approved budget, the Office of Research and Innovation will initiate paperwork to create an account for you. Marquette account numbers consist of four sections:

xx	-	xxxxx	-	xxxxx	-	xxxx
Fund	-	Responsibility Center	-	Restriction	-	Natural

The **Fund** will be 06, as all RRG accounts are reportable research expenditures.

The **Responsibility Center** is a unique account number that represents your RRG.

The **Restriction** will be 00000.

The **Natural** will designate the line item within your account. Below is a quick reference of expense naturals, but not a complete list. For more information on naturals, please work with a staff member in your area who uses the purchasing system or contact the Office of the Comptroller.

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<b>Administrative Expense</b>			<b>Advertising &amp; Public Relations</b>	
Dues and Membership	6620		Advertising	7005
Food Purchases	6625		Promotion & Public Relations	7000
Registration Expenses	6600			
Research Other	7597		<b>Equipment (All Capital Naturals \$5,000 +)</b>	
Retreats	6610		<b>Computer Terminal, Monitors, Printers &amp; Related</b>	<b>1934</b>
Student Social/Cultural Activities	6615		<b>Construction in Progress</b>	<b>1901</b>
			<b>Construction in Progress-ITS</b>	<b>1906</b>
<b>Supplies (Less than \$5,000.00)</b>			<b>Ground Equipment</b>	<b>1934</b>
Chemicals	6235		<b>Kitchen</b>	<b>1934</b>
Clinical Supplies	6234		<b>Office &amp; Other Equipment</b>	<b>1934</b>
Computer Terminal, Monitors, Printers & Related	6260		<b>Office &amp; Residence Hall Furniture</b>	<b>1934</b>
Computer Software	6265		<b>Photo/Audio/Visual</b>	<b>1934</b>
Contract Printing	6215		<b>Scientific/Medical/Dental</b>	<b>1934</b>
Copying	6210		<b>Stage Equipment</b>	<b>1934</b>
Furnishings, Res Hall & Office Furniture	6255		<b>Tools/Maintenance</b>	<b>1934</b>
Graphic Services	6220		<b>Vehicles</b>	<b>1933</b>
Laboratory and Kitchen Supplies	6235			
Mail House Services	6230		<b>Professional Fees</b>	
Office & Other Equipment	6245		Consulting Fees	6505
Office Expenses	6200		Legal Fees	6510
Photo/Audio/Visual	6245		Professional Fees / Honorariums	6500
Photography/Art Expense	6225			
Postage	6205		<b>Travel &amp; Entertainment</b>	
Programs	6275		Business Entertainment	6960
Research Supplies	6297		Domestic Travel-Mileage, Train, Taxi	6905
Test Materials	6240		Domestic Travel - Air Fare	6900
Tools/Maintenance	6245		Domestic Travel - Conference Fees	6920
Video Production	6224		Domestic Travel - Hotel	6910
			Domestic Travel - Meals	6915
			Domestic Travel - Other expenses	6925
<b>Salaries and Wages</b>				
Additional Pay	6010		International Travel - Air Fare	6930
Graduate Research Assistant	6024		International Travel - Conference Fees	6950
Student Employees (Job Connection)	6050		International Travel - Hotel	6940
			International Travel - Meals	6945
			International Travel - Mileage, Train, Taxi	6935
<b>Fringe Benefits</b>	6195		For Travel - Other	6955
			Game guarantees	6975
			Refreshments	6965
			Research Travel	6997
			Student Travel	6995

## Adding Authorized Signers

Once your account is created, the Office of Finance will send you “authorized signer” paperwork.

It is now time to determine who will have spending authority on your account. Faculty who have never used the purchasing system before should contact the Purchasing Office for training. You will need to work with your department and college to identify staff who may need to be added to your account. Common people are department assistants and business directors. If your department chair approves your P-Card or reimbursements, please add them to your account at this time.

Users may also have to complete a [Conflict of Interest Disclosure](#) statement if one is not on file.

## Viewing Your Account in the Marquette Financial System (MFS)

Included in the authorized signer paperwork will be an option to add users and yourself to the account in MFS. The General Ledger function of MFS will allow you to see your balances and transactions in real time. The Purchase Order System of MFS will allow you to create and approve PO's from your account.

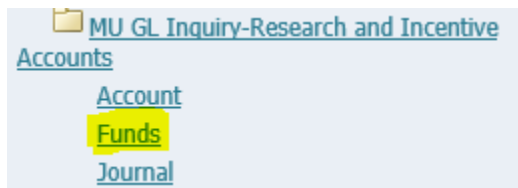
If you want to add access to your account later, the GL and Purchasing User Application can be found on the Comptroller's website:

<http://www.marquette.edu/comptroller/forms.shtml>

The balances shown within the general ledger are for the current fiscal year, not the entire project period if your project spans multiple fiscal years.

The Comptroller's Office will provide training to faculty and staff who request it. To view your balance:

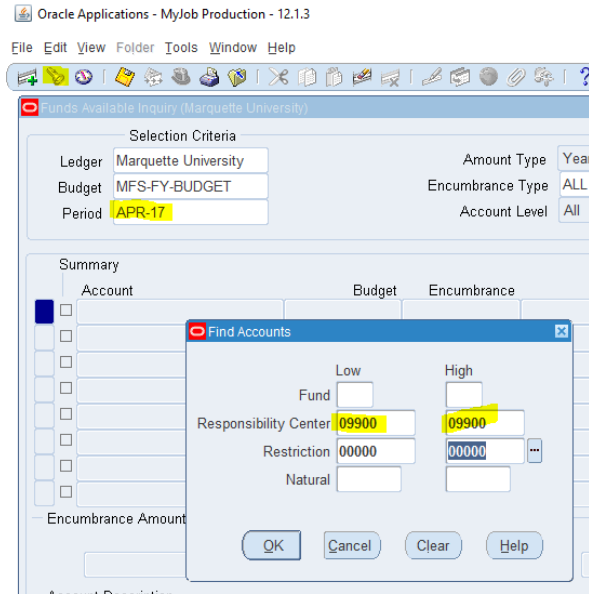
- Log into <https://myjob.mu.edu>  
The Myjob system has recently been restricted to campus. To access the system off campus you must connect to the VPN first. For technical questions please contact the ITS help desk.
- On the left-hand side, select Funds inside of the appropriate GL folder (some users may only have one)



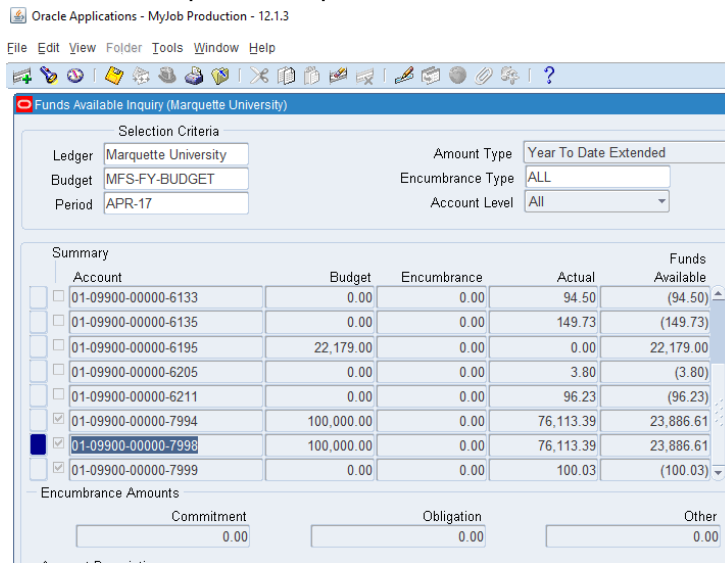
- Oracle will now open a new window and you may be prompted to run java code. If you have any issues, please contact the helpdesk at 288-7799.

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- On this screen you will enter your current period and perform a search:



- Your budget, minus current encumbrance, minus actual expenses leaves your available funds. Encumbrances are orders you have placed, but for which you have not paid. It is the systems method of setting aside funds (encumbering) to be sure you do not lose track of expenses in process.



- The 7998 natural summarizes the entire account balance while the 7999 natural summarizes the operating portion of the account (no capital, salaries, or benefits).

## Accessing Business Intelligence Reports

Account owners may access several Business Intelligence reports, including an operating

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statement, line item balances, and expenses. <https://bi.mu.edu>

- The operating statement will show summarized balances and the operating funds available to spend which excludes salaries, benefits, and capital items.
- The Budget, Actual and Encumbrances Balances will show you the line items of your account without summarizing them.
- The Journal Entries with iExpense Report Detail will show you the line item transactions within your account.

More information can be found [here](#).

## Account Budget and End of Project Sweeping

Your budget will be loaded based on your RRG application and according to the fiscal year split indicated in the RRG paperwork. Budgeting occurs in three categories: salaries, operating, and capital. RRGs do not typically fund capital items. Normally moving funds **between** these categories is not allowed. Therefore, it is important to be specific in your budget about what expenses will be coming from payroll, and which expenses will go through purchasing. The Office of Research and Innovation will take requests to alter your budget after it is established, but may not be able to fulfil them based on the timing of the request in the fiscal year.

From time to time you may need to adjust the budget in your account while keeping the funds in the same category. For example, you may have salary money that moves from student hourly pay to an RA stipend. If you have these types of requests, please contact Mark Simonson in the Office of Research and Innovation.

Requests to push back your money to the next fiscal year or beyond the agreed upon end date of the RRG project will not be granted unless there are extreme circumstances. Please plan on spending your allocation within the original timeframe established. Money budgeted for July – December that goes unspent will be swept in January and put towards future faculty awards. Money will only be swept after pending payments such as student payroll have processed.

## Common Transactions

For more detailed or personalized information on purchasing and accounts payable, please contact [purchasing@marquette.edu](mailto:purchasing@marquette.edu).

To process a check or ACH payment Purchasing must have the vendor set up in their system. If your vendor is new to Marquette, then it is your responsibility to work with the vendor and go through the vendor add process. This will require obtaining the vendor's contact information and W-9. Independent contractors must also complete an Independent Contractor Verification Form. Links are provided below.

- Reimbursements – If you use your personal credit card(s) or cash for business expenses related to your project you may seek reimbursement from the project

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account. Please review the policies for reimbursement by visiting the Accounts Payable website. Some transactions are not eligible or require additional documentation. Reimbursements to staff and faculty should be processed within the iExpense system found in [myjob.mu.edu](http://myjob.mu.edu). Instructions for how to use iExpense are also on the Accounts Payable website. Approval will flow through to the employee's normal approver and then onto someone who has signing authority on your RRG if the normal approver doesn't. This is an example of when it is beneficial for other people within your department to be authorized signers.

- P-Card Transactions – If a faculty or staff member already has a P-Card, they may use it for items related to your project if their supervisor approves their involvement in your project. They will then enter your project account into their P-Card statement. All existing rules regarding the limits and approval workflows still apply.
- Purchase Orders – Purchase orders will be your primary way of purchasing goods and services directly with your project account. Information and training opportunities can be found on the Purchasing Department's website, linked below.
- Internal Payments and Invoices – Goods and services purchased through or by other departments on campus may be billed directly to your account. For example, employees who are paid from your account will be able to charge printing to your account at their department MFD. AMU services and catering can bill an internal account directly. Parking passes, software from ITS, and postage through mail services can also be billed directly to your account. If another department pays for your goods or services first, you may use a Department Expense Transfer form found on the Comptroller's website linked below to move the expense to your project account.
- Other Invoices – Accounts payable has an electronic workflow for invoices submitted to them that are not attached to PO's and may accept a Direct Invoice Voucher attached to documentation to pay a bill. This is a last resort of invoice processing and may incur delays in processing.
- Student Employees – If you will be hiring student employees on an hourly basis, you should hire them via JobConnection. The Office of Student Employment offers monthly training to gain access to this system or someone authorized to spend on your account may already be trained in the system.
- Graduate Assistants, Staff, and Faculty - Faculty and staff can initiate payroll payments from their account, but will need to follow the same guidelines and procedures as any other unit for hiring, including Dean/Director/VP approval on salary authorizations. It is best to consult with both the hiring authority within your department, and the department of the person who you wish to pay. If you don't know who this is, The Office of Research and Innovation will help you get in touch with the right people.

## Useful Links

Comptroller Forms

<http://www.marquette.edu/comptroller/forms.shtml>

Accounts Payable

<http://www.marquette.edu/comptroller/accounts-payable.shtml>

Purchasing

<http://www.marquette.edu/purchasing/>

Student Employment

[http://www.marquette.edu/mucentral/financialaid/ses\\_index.shtml](http://www.marquette.edu/mucentral/financialaid/ses_index.shtml)

Human Resources

<http://www.marquette.edu/hr/>

University Policies and Procedures

<http://www.marquette.edu/university-policies-procedures/>

Myjob/MFS

<https://myjob.mu.edu>

Business Intelligence

<https://bi.mu.edu>

Office of General Counsel Approved Contracts and Independent Contractor Verification Form

<http://www.marquette.edu/ogc/forms/index.shtml>